

# TOPSpro® + Mail Merge =MAGIC!

Penny Pearson, Patty Long

OTAN & CASAS

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- Overview of TOPSpro Enterprise (TE) reports
  - Data for a certificate of recognition/accomplishment
  - Exporting to Excel
- Mail Merge in Word
  - 3 parts: Main/Master document, **data source**, results
  - Personalize communication with students
  - Merge to: letters, name badges, certificates, labels, email...
  - Practice!

Patty intros TE reports & how it can be used to communicate with students. Recognition, etc.

Penny reviews mail merge as 3 parts – data, main document and ‘results’ (letters, certs, labels etc.)

## Data - TE, spreadsheets, tables

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- Data for a certificate or other correspondence
  - Data should be in the smallest pieces possible (i.e. First Name and Last Name, not Name (which is both))
- Exporting to Excel
  - Choosing options in topsPRO or your attendance system (work with your office staff)
  - Considerations - frequency, purpose
- Create your own Data source in Excel
- Create your own Data source in a Word Table

Patty talks about reports and demos how to get the data out of topsPRO (one report does all? )

Show the export process and choosing .xls as file type (and .csv only if they have trouble with .xls)

Ideas for data to extract:

Student data

Plus learning gains

Plus attendance report

Plus whatever you can imagine!

Demo Time!

# Select Payment Points Monitor

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The screenshot displays the TE system interface. At the top, a navigation bar includes 'View', 'Organization', 'Records', 'Reports', 'Tools', and 'Help'. Below this, a 'Payment Points' window is open, showing a 'Report Setup Navigator' on the left and a 'Select report:' section on the right. The 'Report Setup Navigator' lists various report categories, with 'Report Selection' highlighted. A red arrow labeled 'Step 1' points to the 'Report Selection' item. The 'Select report:' section shows a list of reports with checkboxes: 'Payment Points Summary', 'Payment Points Totals', 'Payment Points Summary Aud', and 'Payment Points Monitor'. The 'Payment Points Monitor' checkbox is checked. A yellow arrow points to this checked checkbox. Below the list are buttons for 'Select All', 'Deselect All', and 'Invert selection'. The 'Agency/Site' dropdown is set to '4908 - Rolling Hills Adult School'.

TE View Organization Records Reports Tools Help

Payment Points

Report Setup Navigator

- General Settings
- Class Definitions
- Personnel
- Class Instances
- In Program Years
- Student Records
- Program Enrollments
- Additional Assessments
- Assessment Forms
- Tests
- Report Selection

Agency/Site: 4908 - Rolling Hills Adult School Aggre

Select report:

- ☐ Payment Points Summary
- ☐ Payment Points Totals
- ☐ Payment Points Summary Aud
- ☒ Payment Points Monitor

Select All

Deselect All

Invert selection

# General Settings

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The screenshot shows the 'Payment Points' report setup window. The left sidebar contains a 'Report Setup Navigator' with options like General Settings, Class Definitions, Personnel, Class Instances, In Program Years, Student Records, Class Enrollments, Program Enrollments, Additional Assessments, Assessment Forms, Tests, and Report Selection. The main area is titled 'Agency/Site' and shows '4908 - Rolling Hills Adult School'. It includes sections for 'Report Style Option' (with radio buttons for B&W, Blue, Green, Red), 'Agency Print Option' (radio buttons for ID Name, ID, Name, Name ID), and 'Student Print Option' (radio buttons for ID Name, ID, Name, Name ID). A blue callout box with white text points to the 'Include Dropped/Qualified Students' section, specifically highlighting the 'Only Qualified' radio button and the 'Break on Class' checkbox. The callout text reads: 'Make sure that you choose: • Only Qualified • Break on Class'. Other visible options include 'Warn if too many pages', 'Include Criteria Info', 'Include Prepared By', 'Include Print Time', and 'Special Options'.

Make sure that you choose:

- Only Qualified
- Break on Class

# Export successful!

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TE View Organization Records Reports Tools Help User: E/Coordinator Coordinator 32 Version: 2.0 build 247

Payment Points Payment Points on ...

Keep Session Delete Session Export Print 3 / 25 Find Next Thumbnails Fit Page Fit Width More

**CASAS**

06/10/2013 15:38:34

Page 3 of 25 PPM

Program Year: 2012-2013 Class: 6625 - ESL Advanced  
Agency: 4908 - Rolling Hills Adult School Teacher: 221 - Mueller, Marnie  
Site: 2 - South Campus

**TOPSpro Enterprise**

✓ The export operation was successfully completed.

OK

OR	EA	Student	Instructional Program	Posttest	Site	Class	Gain	S001 Form	S002 Form	S003 Form	Hours	U	T	D
1	599662104	Lam Phuong	ESL		201	2 - 6625	3				100	0	0	
1	599662105	Delfina Garcia	ESL		224	2 - 6625	18				100	20	0	
1	654147741	Maria Villasehor	ESL		224	2 - 6625	6				100	97	0	

Note: Asterisks in report denote outcomes not awarded due to drop reasons or having exceeded maximum allowable Payment Points.

## Save in “Desktop”

The screenshot shows a software window titled 'Export report' with a 'Save as' dialog box open. The dialog box has 'Desktop' selected in the 'Save in' list. The 'Save as type' dropdown is set to 'Excel 2007 Workbook'. A blue callout box with white text says 'Saving on the desktop makes it easier to find your spreadsheet!'. In the background, a data table is visible with columns for 'Pretest', 'Posttest', 'Score', 'Site - Class', 'Form', 'Gain', 'Form', 'Form', 'Form', 'U', 'T', 'D', and 'Inst. Hours'.

Benchmarking Tests											
Pretest				Posttest				Inst. Hours			
Score	Site - Class	Form	Score	Site - Class	Gain	Form	Form	Form	U	T	D
198	N/A	08SL	201	2-6625	3				110	0	0
206	2-6625	08SL	224	2-6625	18				110	20	0
218	2-6625	08SL	224	2-6625	6				101	97	0

And voilà!

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Microsoft Excel - RAVENPOINT MONITOR REPORT

File Edit View Insert Format Tools Data Window Help

Type a question for help

A1	A	B	C	D	E	F	G	H	I	J	K
	Agency	Site	Class	Program	Student	Sex	GED ID	Name	Gender	Birth Date	Drop Reason
2	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****0983			Alt, Mort J	Male	8/21/1982	
3	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****3385			Andrews, Dustin P	Male	10/4/1981	
4	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****3438			Asio, Rick L	Male	6/9/1983	
5	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****3439			Bartholomew, Kirsy	Female	9/9/1980	
6	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****3444			Jacobson, Junior	Male	5/5/1935	
7	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	GED	*****3453			Jipper, Veronica A	Female	1/9/1982	
8	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****3636			Long, Bob A	Male	2/4/1957	02
9	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****3635			Horton, Missy	Female	2/29/1939	
10	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****3875			Hillen, Jasper	Male	3/28/1981	
11	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****4098			Mortner, Sally	Female	6/19/1982	
12	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****4098			Gilmore, Bill	Female	11/7/1982	
13	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****4092			Wimley, Bifford	Male	6/7/1927	02
14	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****4098			Acuna, Rosalina	Female	5/8/1977	
15	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	ESL	*****5398			Garcia, Chuckie T	Male	3/3/1979	15b
16	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****6034			Orange, Martha	Female	7/8/1955	
17	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****7132			Gallegos, Susie	Female	7/15/1981	
18	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****7348			Fabros, Runista L	Female	12/21/1984	
19	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****8216			Williams, Rick	Male	5/20/1982	02
20	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****8350			Mouton, Joseph E	Male	7/19/1984	
21	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****8383			Thorne, Chanisha M	Female	11/3/1985	02
22	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	GED	*****8383			OTHapenstance, Matt R	Female	9/9/1984	
23	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****8547			Sonnenbambant, Anneta	Male	10/19/1979	02
24	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****8757			Jones, Jimmie Z	Male	10/12/1980	
25	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****8833			Crespe, Jose	Male	8/26/1972	
26	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****9384			Bork, Rupert	Female	1/17/1978	
27	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****9389			Aljmaner, Robin A	Female	2/2/1972	02
28	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****9744			Cork, Josh P	Female	3/28/1985	02
29	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****9834			Jacob, Leann	Female	9/22/1964	
30	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****9872			River, Autumn	Female	/ /	01
31	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****9954			Dong, Anh Q	Female	10/10/1949	
32	4908 - Rolling Hills Adult School	1 - North Campus	1001 - ABE Intermediate	Basic Skills (ABE)	*****0507			Fortier, Lon	Female	4/4/1967	
33	4908 - Rolling Hills Adult School	1 - North Campus	1001 - ABE Intermediate	Basic Skills (ABE)	*****1161			Piotin, Ilana	Female	7/14/1982	02
34	4908 - Rolling Hills Adult School	1 - North Campus	1001 - ABE Intermediate	Basic Skills (ABE)	*****4517			Greenleaf, Skip	Male	6/23/1979	
35	4908 - Rolling Hills Adult School	1 - North Campus	1001 - ABE Intermediate	Basic Skills (ABE)	*****4719			Kim, Erica	Female	12/12/1982	
36	4908 - Rolling Hills Adult School	1 - North Campus	1001 - ABE Intermediate	Basic Skills (ABE)	*****4630			Karahan, Ayslem	Female	7/28/1980	
37	4908 - Rolling Hills Adult School	1 - North Campus	1001 - ABE Intermediate	Basic Skills (ABE)	*****7111			Aguilar, Saul	Male	12/18/1981	02
38	4908 - Rolling Hills Adult School	1 - North Campus	12345 - ESL - proxy	ESL	*****0030			Good, Jerry B	Female	8/16/1974	15b
39	4908 - Rolling Hills Adult School	1 - North Campus	12345 - ESL - proxy	ESL	*****8383			Coaley, Andrew E	Male	10/18/1969	02
40	4908 - Rolling Hills Adult School	1 - North Campus	12345 - ESL - proxy	ESL	*****9865			J. sm. Ehat	Female	1/11/1965	15b

Draw AutoShapes



# Now, one more thing...



Microsoft Excel - RAVENPOINT MONITOR REPORT

A1	A	B	C	D	E	F	G	H	I	J	K
	Agency	Site	Class	Program	Student	SSN	GED ID	Name	Gender	Birth Date	Drop Reason
2	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****0983			Alt, Mort J	Male	8/21/1982	
3	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****3385			Andrews, Dustin P	Male	10/4/1981	
4	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****3438			Antoni, Rick L	Male	6/9/1983	
5	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****3439			Bartholomew, Kristy	Female	9/9/1980	
6	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****3444			Jacobson, Junior	Male	5/5/1935	
7	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	GED	*****3453			Jasper, Veronica A	Female	1/9/1982	
8	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****3636			Long, Bob A	Male	2/4/1957 02	
9	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****3635			Horton, Missy	Female	1/29/1939	
10	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****3875			Hillen, Jasper	Male	3/28/1981	
11	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****4098			Hortner, Sally	Female	8/19/1982	
12	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****4098			Simone, Bill	Female	11/7/1982	
13	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****4092			Wimley, Delford	Male	6/7/1927 02	
14	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****4098			Jacobs, Rosalina	Female	5/8/1977	
15	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	ESL	*****5398			Garcia, Chuckie T	Male	3/3/1979 15b	
16	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****6034			Grange, Martha	Female	7/8/1955	
17	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****7132			Gallegos, Susie	Female	7/15/1981	
18	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****7348			Fabros, Rosalia L	Female	12/21/1988	
19	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****8216			Williams, Rick	Male	5/20/1982 02	
20	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****8350			Mouton, Joseph E	Male	7/19/1984	
21	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****8383			Thorne, Chantula M	Female	11/3/1985 02	
22	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	GED	*****8383			O'Happentance, Matt R	Female	9/9/1984	
23	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****8547			Sonnenbuhlant, Annetta	Male	10/19/1979 02	
24	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****8757			Jones, Jimmie Z	Male	10/12/1980	
25	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****8833			Crespe, Jose	Male	8/26/1972	
26	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****9384			Bork, Rupert	Female	1/17/1978	
27	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****9389			Aljmaner, Robin A	Female	2/2/1972 02	
28	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****9744			Cork, Josh P	Female	3/28/1985 02	
29	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****9834			Jacob, Lanan	Female	9/22/1964	
30	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****9872			River, Autumn	Female	/ /	01
31	4908 - Rolling Hills Adult School	1 - North Campus	1 - ABE	Basic Skills (ABE)	*****9954			Dong, Anh Q	Female	10/10/1949	
32	4908 - Rolling Hills Adult School	1 - North Campus	1001 - ABE Intermediate	Basic Skills (ABE)	*****0507			Porter, Lon	Female	4/4/1967	
33	4908 - Rolling Hills Adult School	1 - North Campus	1001 - ABE Intermediate	Basic Skills (ABE)	*****1161			Horton, Diana	Female	7/14/1982 02	
34	4908 - Rolling Hills Adult School	1 - North Campus	1001 - ABE Intermediate	Basic Skills (ABE)	*****4517			Greenleaf, Ship	Male	6/23/1979	
35	4908 - Rolling Hills Adult School	1 - North Campus	1001 - ABE Intermediate	Basic Skills (ABE)	*****4719			Kim, Erica	Female	12/12/1982	
36	4908 - Rolling Hills Adult School	1 - North Campus	1001 - ABE Intermediate	Basic Skills (ABE)	*****4630			Larkhan, Ayslem	Female	7/28/1980	
37	4908 - Rolling Hills Adult School	1 - North Campus	1001 - ABE Intermediate	Basic Skills (ABE)	*****7111			Aguiar, Saud	Male	12/19/81 02	
38	4908 - Rolling Hills Adult School	1 - North Campus	12345 - ESL - proxy	ESL	*****0030			Good, Jerry B	Female	8/16/1974 15b	
39	4908 - Rolling Hills Adult School	1 - North Campus	12345 - ESL - proxy	ESL	*****8383			Coakley, Andrew E	Male	10/18/1969 02	
40	4908 - Rolling Hills Adult School	1 - North Campus	12345 - ESL - proxy	ESL	*****3885			Kim, Rhay	Female	1/11/1965 15b	

It is important to have your data in the smallest increments possible. If you left the “name” field as is, when you inserted “name” into your documents, they would always show up in this format: Lastname, Firstname. This makes it difficult to personalize your letters, certificates or other documents.

## Add a new column

**Right-click on the column letter for Gender (or where ever you wish the new column to appear.) Choose Insert**

**Your new empty column is ready for data from your "Name" column.**

GED ID	Name	Gender	Date of Birth
	Doha, Darius	Male	
	Vega, David	Male	
	Robles, Elsie	Female	
	Cristobal, Jose	Male	
	Jaruleski, Doris	Female	
	Vergara, Luisa	Female	
	Huata, Mianda	Male	
	Wu, Shoufu	Male	
	Acosta, Melinda	Female	
	Luzanov, Helena	Female	
	Yang, Kee	Male	
	Arando, Azucena	Female	
	Salvador, Nina	Female	1/10/1962 15b
	Rodriguez, Luis	Male	11/24/1977 15b
	Alcazar, Leo	Male	6/22/1983 02
	Mariscos, Roberto	Male	9/17/1975 15b
	Santiago, Gomez	Male	12/3/1978 15b
	Barron, Joe	Male	6/10/1980 15b

## Highlight Name column...

F	G	H	I	J	K	L	M
Ssn	GED ID	Name		Gender	Birth Date	Drop Reason	Focus
		Doha, Darius		Male	12/22/1971 '02		
		Vega, David			80 '02		
		Robles, Elsie			84 15b		
		Cristobal, Jose			80 15b		
		Jaruleski, Doris			58 15b		
		Vergara, Luisa			83 15b		
		Huata, Mianda			77 15b		
		Wu, Shoufu			75 '02		
		Acosta, Melinda			78 15b		
		Luzanov, Helena			69 15b		
		Yang, Kee			79 15b		
		Arando, Azucena			84 '02		
		Salvador, Nina		Female	1/10/1962 15b		
		Rodriguez, Luis		Male	11/24/1977 15b		
		Alcazar, Leo		Male	6/22/1983 '02		
		Mariscos, Roberto		Male	9/17/1975 15b		
		Santiago, Gomez		Male	12/3/1978 15b		
		Barron, Joe		Male	6/10/1980 15b		
		Nievarra, Raquel		Female	5/21/1976 '02		
		Altamirano, Pedro		Male	1/21/1986 '02		
		Arteste, Geralde		Male	10/3/1941 15b		
		Maceda, Lara		Female	6/18/1982 '02		
		Fratlicelli, Sofia		Female	1/19/1966 15b		
		Yang, Jack		Male	9/2/1983 '02		
		Lopez, Veronica		Female	11/13/1978 15b		
		Rodriguez, Aurelio		Male	12/13/1976 15b		

Click on the column letter to select the entire column. (In this case, column "H.")

Adding a new column will allow your data to “overwrite” into a blank set of cells. If you did not do this, you would overwrite the data in the “Gender” column.

# Click "Text to Columns"

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	F	G	J	K	L	M	N	O	P	Q	R	S	T
	Ssn	GED ID	Name		Birth Date	Re			Family Literacy	Significant Gain	Two-Levels Movement	GED	Highschool Diploma
1			Alt, Mort J		8/21/1983								
2			Andrews, Dustin P		10/4/1981								
3			Ankiel, Rick L		6/9/1983								
4			Bartholomew, Krissy		9/9/1980								
5			Jacobsen, Junior		5/5/1935								
6			Jipper, Veronica A		1/9/1962								
7			Long, Bob A		2/4/1967 '02								
8			Horton, Missy		1/29/1939								
9			Hillen, Jasper		3/28/1981								
10			Mortimer, Sally		6/19/1962								
11			Gilmore, Bill		11/7/1982								
12			Wimsley, Bilford		6/7/1927 '02								
13			Acuna, Rosalina		5/9/1977								
14			Garcia, Chuckie T		3/3/1979 15b								
15			Orange, Martha		7/8/1959								
16			Gallegos, Susie		7/15/1981								
17			Fabros, Ruinistia L		12/21/1984								
18			Williams, Rick		5/20/1982 '02								
19			Mouton, Joseph E		7/19/1984								
20			Thorne, Chanisha M		11/3/1980 '02								
21			O'Happenstance, Matt R		9/9/1984								
22			Sonnenambulant, Annota		10/19/1979 '02								
23			Jones, Jimmie Z		10/12/1980								
24			Crispa, Jose		8/26/1972								
25			Bork, Rupert		1/17/1978								
26			Aljmaner, Robin A		2/2/1972 '02								
27			Cork, Josh P		3/28/1985 '02								
28			Jacob, Lexan		9/22/1964								
29			River, Autumn		/ / '01								
30			Dong, Anh Q		10/10/1949								
31			Fortier, Lori		4/4/1967								
32			Piotkin, Ilana		7/14/1982 '02								
33			Greenleaf, Skip		5/23/1979								
34			Kim, Erica		12/12/1982								
35			Karahan, Ayshem		7/28/1980								
36													

The wizard will walk you through "separating" your text. For the first step, verify "Delimited" is chosen, then click "Next."

# Click "Comma"

By choosing both the Comma and Space delimiter, you get rid of the 'extra space' left after the comma. (Look at your Data Preview to see what it will look like.)

The dialog box 'Convert Text to Columns Wizard - Step 2 of 3' is shown. In the 'Delimiters' section, both ☒ Comma and ☒ Space are selected. The 'Text qualifier' is set to 'None'. The 'Data preview' section shows the following data:

Name	Gender	Birth Date
Doha, Darius	Male	12/22/1971 02
Vega, David	Male	11/11/1980 02
Robles, Elsie	Female	10/1/1984 15b
Cristobal, Jose	Male	12/20/1980 15b
Januleski, Doris	Female	7/20/1958 15b
Vergara, Luisa	Female	12/1/1983 15b

The background spreadsheet shows columns: Ssn, GED ID, Name, Gender, Birth Date, Drop Reason, Focus, Workplace Education, and Family Literacy. The 'Name' column contains names like 'Doha, Darius', 'Vega, David', 'Robles, Elsie', 'Cristobal, Jose', 'Januleski, Doris', 'Vergara, Luisa', 'Gonzalez, Alex', 'Yang, Tuo', 'Foroshani, Oscar', 'Martinez, Albello', 'Vang, Khamboon', 'Delgado, Lena', 'Bello, Rogelio', 'Rodriguez, Rodolfo', and 'Phou, Xay'.

## Names separated in "Data Preview"

Student	Ssn	GED ID	Name	Gender	Birth Date	Drop Reason	Focus	Wor Edu
*****0043			Doha, Darius	Male	12/22/1971	02		1
*****0089			Vega, David					1
*****0117			Robles, Elsie					1
*****0359			Cristobal, Jose					1
*****0368			Landeski, Jose					1
*****0601								1
*****0603								1
*****1043								1
*****1083								1
*****1094								1
*****1288								1
*****1367								1
*****1381								1
*****1426								1
*****2266								1
*****2277								1
*****2339								1
*****2361								1
*****2564								1
*****2728								1
*****2850								1
*****3236								1
*****3331								1
*****3731								1
*****4187								1
*****4444								1
*****4489								1
*****4784								1
*****5084			Pacheco, Andy	Male	4/21/1967	15b		1
*****5167			Ergodan, Erma	Female	7/5/1961	15b		1
*****5177			Gonzalez, Alex	Male	9/16/1964	02		1
*****5207			Yang, Tiao	Male	6/5/1986	07a		1
*****5207			Foroshani, Oscar	Male	2/11/1981	15b		1
*****5204			Martinez, Albello	Male	6/7/1973	15b		1
*****5223			Vang, Khamboon	Male	12/16/1974	02		1
*****5322			Delgado, Lena	Female	10/5/1978	15b		1

Convert Text to Columns Wizard - Step 2 of 3

This screen lets you set the delimiters your data contains. You can see how your data will be previewed below.

Delimiters

☐ Tab

☐ Semicolon

☒ Comma

☒ Space

☐ Other:

☒ Treat consecutive delimiters as one

Text qualifier:

Data preview

Name
Doha, Darius
Vega, David
Robles, Elsie
Cristobal, Jose

Cancel < Back Next > Finish

Look closely at the data preview to make sure it is accurate. (Note: If you choose 2 delimiters, the "Treat consecutive delimiters as one" will turn on automatically.)

Look! No space! Yay!



And click “Finish.”

Program	Student	Ssn	GED ID	Name	Gender	Birth Date	Drop Reason	Focus	Workplace Education	Fa Lit
ESL	*****0043			Doha, Darius	Male	12/22/1971 '02				
ESL	*****0089			Vega, David	Male	11/11/1980 '02				
ESL	*****0117			Robles, Elsie	Female	10/1/1984 15b				
ESL	*****0359			Cristobal, Jose	Male	12/20/1980 15b				
ESL	*****0368			Janilecki, Doris	Female	7/20/1958 15b				
ESL	*****0601					12/1/1983 15b				
ESL	*****0603					8/18/1977 15b				
ESL	*****1043					1/24/1975 '02				
ESL	*****1083					1/30/1978 15b				
ESL	*****1084					7/14/1969 15b				
ESL	*****1103					12/16/1979 15b				
ESL	*****1288					9/9/1984 '02				
ESL	*****1367					1/10/1962 15b				
ESL	*****1381					11/24/1977 15b				
ESL	*****1426					6/22/1983 '02				
ESL	*****2266					9/17/1975 15b				
ESL	*****2277					12/3/1978 15b				
ESL	*****2339					6/10/1980 15b				
ESL	*****2361					5/21/1976 '02				
ESL	*****2564					1/21/1986 '02				
ESL	*****2728					10/3/1941 15b				
ESL	*****2950					6/18/1982 '02				
ESL	*****3236					1/19/1966 15b				
ESL	*****3331					9/2/1983 '02				
ESL	*****3731					11/1/1980 15b				
ESL	*****4187									
ESL	*****4444									
ESL	*****4489									
ESL	*****4784			Pacheco, Andy	Male	4/1/1981 15b				
ESL	*****5084			Ergodan, Erma	Female	7/5/1981 15b				
ESL	*****5167			Gonzalez, Alex	Male	9/16/1984 '02				
ESL	*****5175			Yang, Tiao	Male	6/5/1986 07a				
ESL	*****5201			Foroshani, Oscar	Male	2/11/1981 15b				
ESL	*****5204			Martinez, Albello	Male	6/7/1973 15b				
ESL	*****5223			Vang, Khamboon	Male	12/16/1974 '02				

Convert Text to Columns Wizard - Step 3 of 3

This screen lets you select each column and set the Data Format.

Column data format

☒ General  
☐ Text  
☐ Date: MDY  
☐ Do not import column (skip)

'General' converts numeric values to numbers, date values to dates, and all remaining values to text.

Advanced...

Destination: \$H\$1

Data preview

General	General
Name	
Doha, Darius	
Vega, David	
Robles, Elsie	
Cristobal, Jose	

Cancel < Back Next > Finish

Click finish to complete the conversion.



Ta-Da!

D	E	F	G	H	I	J
Program	Student	Sen	GED ID	Name	Gender	Birth Date
ESL	*****0043			Darius	Male	
ESL	*****0089			Davis	Male	
ESL	*****0117			Robles	Female	
ESL	*****0359			Cristobal	Male	
ESL	*****0368			Jaruleski	Female	
ESL	*****0601			Vergara	Female	12/1/198
ESL	*****0603			Huata	Male	8/18/19
ESL	*****1043			Wu	Male	1/24/1975 '02
ESL	*****1083			Acosta	Female	1/30/1978 15b
ESL	*****1084			Luzanov	Female	7/14/1969 15b
ESL	*****1103			Yang	Male	12/16/1979 15b
ESL	*****1288			Arando	Female	9/9/1984 '02
ESL	*****1367			Salvador	Female	1/10/1962 15b
ESL	*****1381			Rodriguez		
ESL	*****1426			Alcazar		
ESL	*****2266			Mariscos		
ESL	*****2277			Santiago		
ESL	*****2339			Barron		
ESL	*****2361			Nievarra		
ESL	*****2564			Altamirano		

G	H	I	J
GED ID	Lastname	Firstname	Gender
	Dohs	Darius	Male
	Vega	Davis	Male
	Robles	Elsie	Female
	Cristobal	Jose	Male
	Jaruleski		
	Vergara		
	Huata		
	Wu		
	Acosta		
	Luzanov		
	Yang	Kee	Male

SAVE YOUR FILE!

You must rename each column for each piece of data: "Firstname" and "Lastname." This makes it much easier to personalize your documents. (Data should be in the smallest "pieces" possible.)

Now you can use either field within your documents.

After you complete "Text to Columns" you will need to make sure your new column is named correctly. The name is in the "header row" or the first row of your data. Accurately name each column for the type of data represented. In this case, "FirstName" and "LastName." This will make it much easier to personalize your mail merge documents.

## Mail Merge 101

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## Mail Merge

Summer Institute 2013

- Personalize communication with students
- 3 parts: Main document, data source, results
- Results are: letters, name badges, certificates, labels, email...
- Demo Time!



Penny talks about mail merge – 3 parts

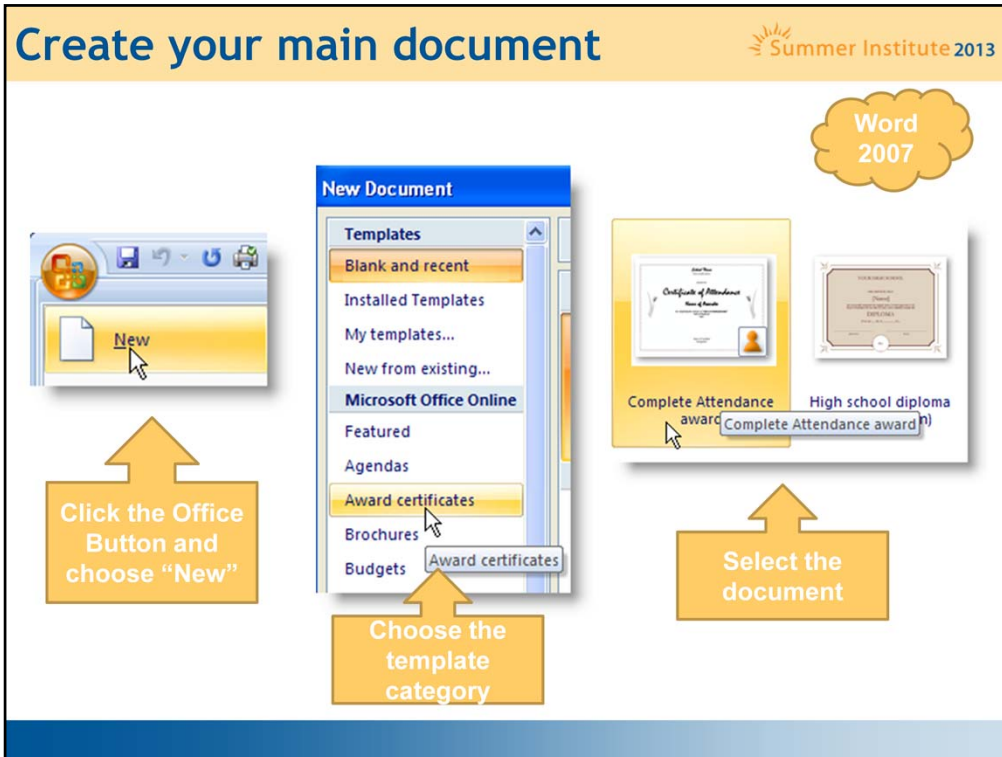
Data source (from tops pro)

Main document ( certificate, labels, letters etc.)

Results - your data showing up on the main document as a new “set” of letters, labels, certificates, etc.

Use the main document over and over again with different data sources.

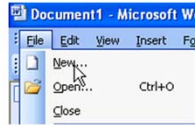
Show how to “pick” from within data source different criteria – i.e. hours vs 2 level gains, vs EL Civics etc... [Use select recipients and ‘filtering’ for this... easier than doing Excel as a database. ]



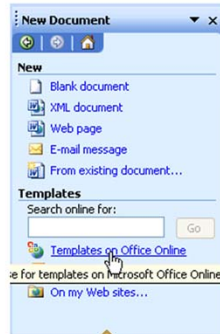
The steps are similar in Word 2003.  
Most templates can be "downloaded" from the Microsoft Office site.

## Create Your Main Document

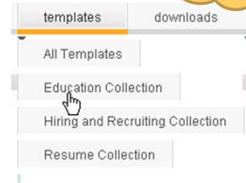
Word  
2003



Click "File" on the menu bar, then "new"



From the task pane on the right, choose "Templates on Office Online"



Search for an appropriate template. Select it for download.\*

\* Note: Be sure you choose documents for Word 2003.

## Customize your document

*School Name*  
School complete address

presents this

*Certificate of Attendance*

to  
*Name of Awardee*

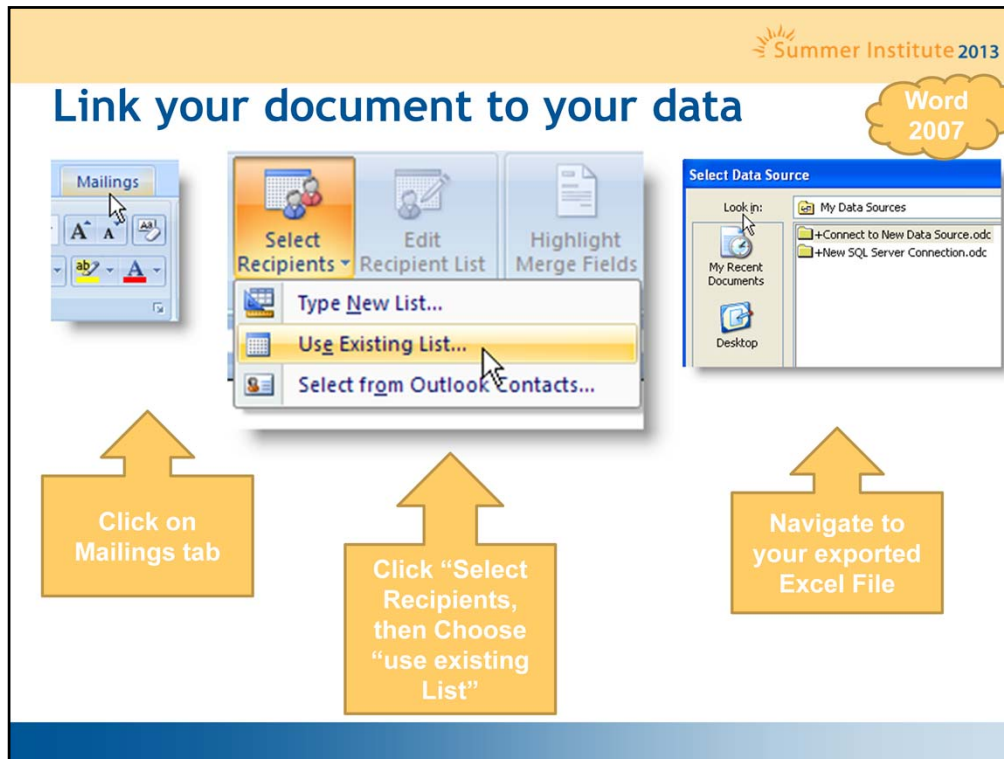
for completing the seminar on "*Name of Activity/Seminar*"  
Held at the (place)  
Date

Name of Facilitator  
Designation

Add 'static' information (it doesn't change)

Open the file *Certificate of Attendance Main Document.doc* from the resource CD.

Select the text for School Name and fill it in with your school's information. Do the same for the address, and any other information you want reflected on each certificate



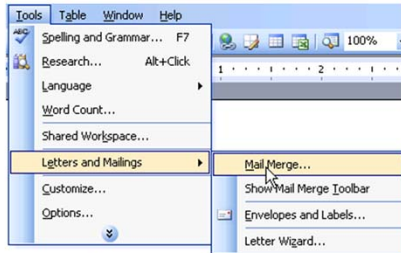
To customize the information on what class was completed and what program, specific fields need to be added to replace the text *"Name of Activity/Seminar."* To do this, you must *link* the data file (*Session Roster for 2009*) to our main Certificate document.

Click on the Mailings tab in the Ribbon and click on Select Recipients.

Click on Use Existing List. In the Select Data Source window navigate to where your data file is stored. Select it and click Open.

In the Select Table dialog box, you must select which sheet within your workbook is the one that has the information on it you wish to use. In this case for the Session Roster, choose PPs Monitor and click OK.

## Start the Mail Merge Wizard



Click  
Tools>Letters &  
Mailings>Mail  
Merge



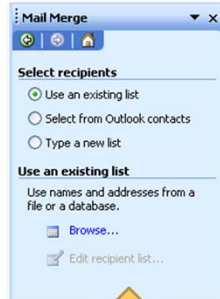
The wizard will  
walk you  
through step-  
by-step



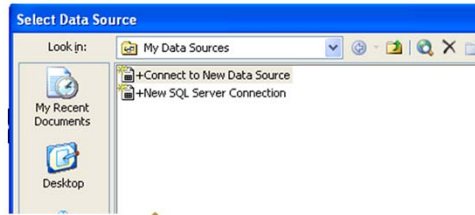


## Selecting the data source

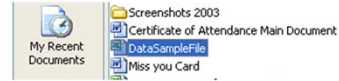
Word  
2003



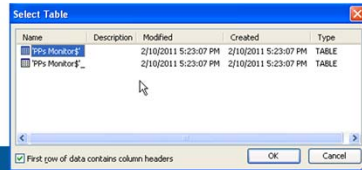
1  
Click  
Browse



2  
Find your  
data  
source



3  
Select your  
data source



4  
Select  
sheet

## Select data continued

**Mail Merge Recipients**

To sort the list, click the appropriate column heading. To narrow down the recipients displayed by a specific criteria, such as by city, click the arrow next to the column heading. Use the check boxes or buttons to add or remove recipients from the mail merge.

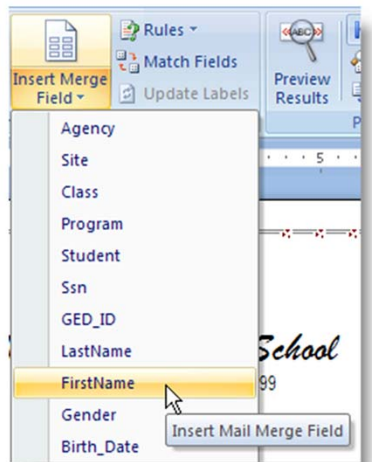
List of recipients:

	LastName	FirstName	Agency	Site	Class	Program
<input checked="" type="checkbox"/>	Doha	Darius	4908 - Ro...	11 - N...	110 - Lo...	ESL
<input checked="" type="checkbox"/>	Vega	David	4908 - Ro...	11 - N...	110 - Lo...	ESL
<input checked="" type="checkbox"/>	Robles	Elsie	4908 - Ro...	11 - N...	110 - Lo...	ESL
<input checked="" type="checkbox"/>	Cristobal	Jose	4908 - Ro...	11 - N...	110 - Lo...	ESL
<input checked="" type="checkbox"/>	Jaruleski	Doris	4908 - Ro...	11 - N...	110 - Lo...	ESL
<input checked="" type="checkbox"/>	Vergara	Luisa	4908 - Ro...	11 - N...	110 - Lo...	ESL
<input checked="" type="checkbox"/>	Huata	Mlanda	4908 - Ro...	11 - N...	110 - Lo...	ESL
<input checked="" type="checkbox"/>	Wu	Shoufu	4908 - Ro...	11 - N...	110 - Lo...	ESL
<input checked="" type="checkbox"/>	Acosta	Melinda	4908 - Ro...	11 - N...	110 - Lo...	ESL
<input checked="" type="checkbox"/>	Luzanov	Helena	4908 - Ro...	11 - N...	110 - Lo...	ESL
<input checked="" type="checkbox"/>	Yang	Kee	4908 - Ro...	11 - N...	110 - Lo...	ESL
<input checked="" type="checkbox"/>	Arango	Armando	4908 - Ro...	11 - N...	110 - Lo...	ESL

5  
Confirm  
your data  
list and Click  
OK

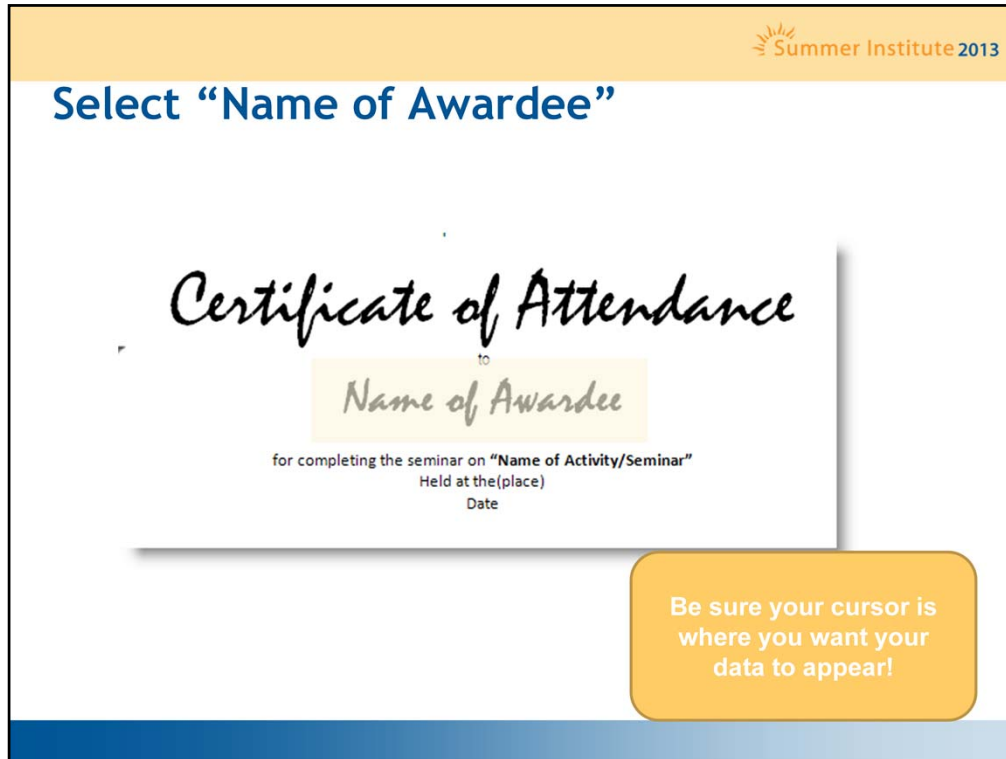
Click "Next: Write Your  
Letter" in the Mail  
Merge Wizard (task  
pane on the right)

## Embed Personalized Fields

Word  
2007

The list under the Insert Merge Field button represents all the data field from your data source.

The next steps involve placing the correct field names where you wish the data to appear on your certificate. Select the text *Name of Awardee*.



Now click on the Insert Merge Field from the Mailings Ribbon at the top of the page.

Click on Name to insert that field into your Certificate document. It appears like this: <<Name>> The brackets indicate this is a data field. Do not try and TYPE this into your document. You must use the Insert Merge Field option.

Next you must enter the fields that represent the program, class and any other information you want on your certificate. Select the text "seminar on "Name of Activity/Seminar."

Click on the Insert Merge Field button and select Program to insert this field into your certificate.

Follow the same process to insert the field Class after Program. (Be sure you put a space between the two field!)

## Embed personalized fields (data)

### Write your letter

If you have not already done so, write your letter now.

To add recipient information to your letter, click a location in the document, and then click one of the items below.

Address block...

Greeting line...

Electronic postage...

Postal bar code...

More items...

When you have finished writing your letter, click Next. Then you can preview and personalize each recipient's letter.

*Best Adult School in California*

presents this

**Certificate of Attendance**

to

**Name of Awardee**

for completing the seminar on "Name of Activity/Seminar"

Held at the (place)

Date

**Insert Merge Field**

Insert:  
☐ Address Fields  
☒ Database Fields

Fields:

- Agency
- Site
- Class
- Program
- Student
- Ssn
- GED ID
- LastName
- FirstName
- Gender
- Birth Date
- Drop Reason
- Focus
- Workplace Education
- Family Literacy

Match Fields... Insert Cancel

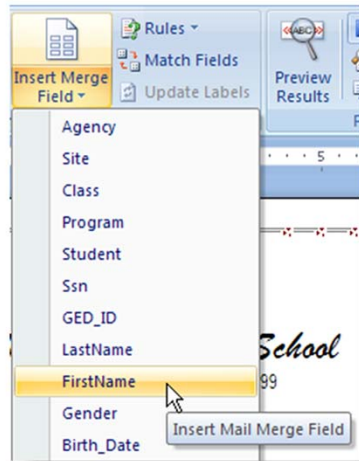
Select the text you wish to change. Choose "More items" from the Mail Merge Wizard

Select the field name you want and click "Insert"

Repeat these two steps for each field you want to insert into your document.

## Add your field names

Word  
2007



Click "Insert Merge  
Field" drop down

Click FirstName (or  
any other field you  
want to appear in this  
spot)

## Continue inserting fields

*Certificate of Completion*

«FirstName» «LastName»

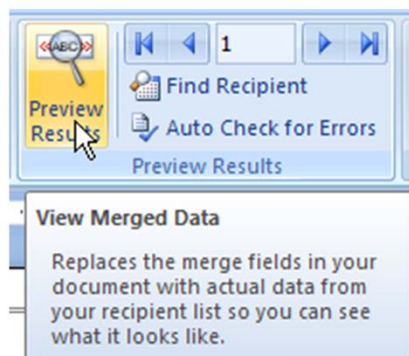
for successfully completing «Program» «Class»

June 24, 2009

When you complete the merge, each field will display the data in your Excel worksheet. Don't forget spaces and punctuation!

## Preview your document

Word  
2007



Use the navigation buttons to preview all your recipients.

to  
*Darius Doha*  
for successfully completing ESL 110 - Low Beginning  
June 24, 2009



## Preview your document

Word  
2003



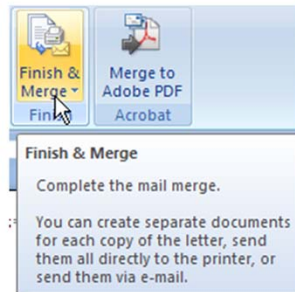
Use the Wizard to scroll through all your documents.

Review your document to make sure everything is correct. Next is to actually merge the document into individual certificates.

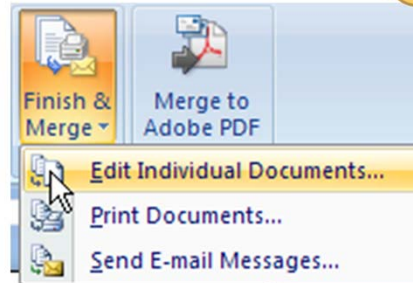
In the Mail Merge Wizard, click the next step "Complete the Merge"

## Ready to merge!

Word  
2007



Click on "Finish & Merge" in the ribbon

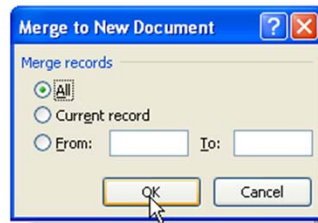


Choose "Edit Individual Documents" to get a separate file of *each* of your records. You can add special information to a certificate that was not in your data document.

## Ready to merge!

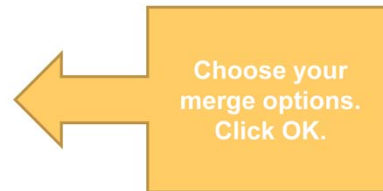
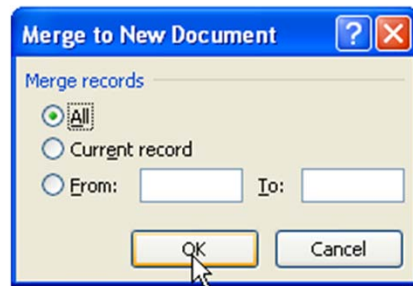


Choose "Edit individual letters"



Choose your merge options.  
Click OK.

## Merge options

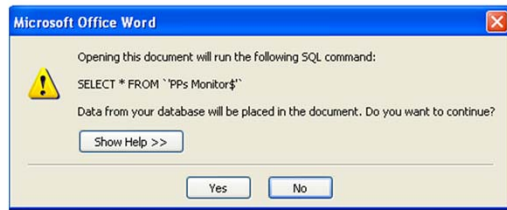


MAGIC! ☺



Each certificate is a separate page. You can add text – such as a special message – to any page. You can save all 81 certificates as ONE Word document. You can easily return and print out just one page if necessary.

## Other notes



When you re-open your main document (certificate) Word gives you a warning. It is simply telling you that it is linked to a data source. Be sure to say "Yes" to open the document. You can always **CHANGE** the data source once the file is open. (See slide "Link your document to your data")

## What can YOU do?

 Summer Institute 2013

- Brainstorm with your neighbor on how you could use this at your school.
- The resource wiki contains files you can use.
  - Data files (Excel)
  - Main documents (Certificate)
- Explore using built-in Word templates
- The resource files also include links to Mail merge tutorials online.
- Practice, practice, practice!

So, how are you doing?





## Time to practice!

 Summer Institute 2013

- Use the files provided off the wiki  
<http://pennyspresentations.wikispaces.com>
- Create your own document if you prefer.
- Complete one final document to prove you can do it!

It is important that you keep doing Mail Merge – even for your own personal use (remember those Holiday letters? Why not use Mail Merge and personalize them for your family? They'll love it! And it won't feel like a "form letter.") Keep these resources nearby in case you forget a step. As you do this over and over again you will become more comfortable and efficient. Also know that you are learning the most simple form of mail merge. Word is capable of very complex merges with logic statements (if this; then to that) as well as *stops* to input user data during a merge, and much, much more.)

If you need more help, contact OTAN, or look for good tutorials on Office.com and through YouTube. 😊

- Thank you for coming today!
- Please contact me if you have questions:
  - Penny Pearson, [ppearson@otan.us](mailto:ppearson@otan.us)
- We value your feedback
  - Please fill out the evaluation form.
  - Return the evaluation to your presenter.

